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10/716,944	11/18/2003	L. Keith Lipman	INWO0053	7265
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GLENN PATENT GROUP 3475 EDISON WAY, SUITE L MENLO PARK, CA 94025			EXAMINER TRUONG, CAM Y T	
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**Please find below and/or attached an Office communication concerning this application or proceeding.**

The time period for reply, if any, is set in the attached communication.

<b>Interview Summary</b>	Application No. 10/716,944	Applicant(s) LIPMAN ET AL.	
	Examiner Cam Y T. Truong	Art Unit 2162	

All participants (applicant, applicant's representative, PTO personnel):

(1) Cam Y T. Truong (Examiner). (3)\_\_\_\_\_.

(2) Chris Peil (Attorney). (4)\_\_\_\_\_.

Date of Interview: 25 July 2007.

Type: a) ☒ Telephonic b) ☐ Video Conference  
c) ☐ Personal [copy given to: 1) ☐ applicant 2) ☐ applicant's representative]

Exhibit shown or demonstration conducted: d) ☐ Yes e) ☐ No.  
If Yes, brief description: \_\_\_\_\_.

Claim(s) discussed: 1.

Identification of prior art discussed: \_\_\_\_\_.


Agreement with respect to the claims f) ☐ was reached. g) ☒ was not reached. h) ☐ N/A.

Substance of Interview including description of the general nature of what was agreed to if an agreement was reached, or any other comments: Applicant's representative sent a proposed amendment to Examiner. Also, Applicant's representative discussed the difference between the cited art with amended claim. Examiner confirmed with applicant that the proposed amendment gets over the cited art. Applicant's representative will fill a RCE for further consideration and/or search.

(A fuller description, if necessary, and a copy of the amendments which the examiner agreed would render the claims allowable, if available, must be attached. Also, where no copy of the amendments that would render the claims allowable is available, a summary thereof must be attached.)

THE FORMAL WRITTEN REPLY TO THE LAST OFFICE ACTION MUST INCLUDE THE SUBSTANCE OF THE INTERVIEW. (See MPEP Section 713.04). If a reply to the last Office action has already been filed, APPLICANT IS GIVEN A NON-EXTENDABLE PERIOD OF THE LONGER OF ONE MONTH OR THIRTY DAYS FROM THIS INTERVIEW DATE, OR THE MAILING DATE OF THIS INTERVIEW SUMMARY FORM, WHICHEVER IS LATER, TO FILE A STATEMENT OF THE SUBSTANCE OF THE INTERVIEW. See Summary of Record of Interview requirements on reverse side or on attached sheet.

Examiner Note: You must sign this form unless it is an Attachment to a signed Office action.

  
Examiner's signature, if required

## CLAIMS

1. (currently amended) A matter-centric document management system (DMS) comprising:

means for setting up a matter file including a plurality of folders, each folder corresponding to a document type; and

an attribute assignment component to automatically create metadata data fields for a new document, when the new document is placed in a folder, the metadata fields appropriate for the document type; and

a search component wherein user-formulated queries are saved to said matter file, wherein said saved queries are browse-able and can be re-run at a user's option by selecting a query and wherein saved queries are associate-able with documents and folders.

2. (previously presented) The DMS of claim 1, further comprising:

a metadata copying component to automatically fill in the metadata fields which correspond to metadata fields in a parent folder.

3. (previously presented) The DMS of claim 1, further comprising:

a security component to assign a security level to the document, the security level corresponding to a security level of a parent folder.

4. (previously presented) The DMS of claim 1, further comprising:

a matter creation component to create a new matter folder, the matter creation means comprising:

matter type component to receive a matter type selection from a user, and to create a plurality of folders within the new matter folder, each folder corresponding to a document type.

5. (previously presented) The DMS of claim 4, wherein the matter creation

component further comprises:

a work list component to receive a list of users for the new matter folder, and to add the new matter folder to a My Matters folder for the list of users.

6. (previously presented) The DMS of claim 4, wherein the matter creation component further comprises:

an email interface to generate an email address for the matter folder, the email address to receive emails and file them in a correspondence folder in the matter folder.

7. (original) The DMS of claim 6, wherein the email address comprises:

a display address closely related to a matter folder name; and an actual address corresponding to the display address, the actual address being a unique string.

8. (previously presented) The DMS of claim 1, further comprising:

a subscription component to enable a user to subscribe to a matter file, the subscription putting a copy of a matter file in the user's My Matters list.

9. (previously presented) The DMS of claim 8, wherein the subscription component enables a user to subscribe to a matter file at a second level, wherein the subscription includes the matter file and documents and other folders.

10. (previously presented) The DMS of claim 8, where the component enables a user to subscribe to another user's subscription list and the user may be granted rights to modify another user's subscription list.

11. (previously presented) The DMS of claim 1, further comprising: an email component to file emails in an appropriate matter file.

12. (previously presented) The DMS of claim 11, further comprising: the component to prompt a user to send a copy of an email to the matter folder.

13. (previously presented) The DMS of claim 1, further comprising: a matter file component to arrange the matter file into a taxonomy based on the metadata of the matter file.

14. (previously presented) The DMS of claim 1, further comprising: a matter file component to arrange the matter file into ontology based on attributes of the matter file.

15. (previously presented) The DMS of claim 1, further comprising: a refilling component to simplify moving a plurality of objects into a matter folder by propagating the metadata to each of the objects in a hierarchical manner.

16. (currently amended) A computerized method of implementing a matter-centric document management system comprising:

having a plurality of templates, each template designed to set up a matter file including a plurality of folders, each folder corresponding to a document type; and setting up a matter file in response to a user request, the matter file including the plurality of folders; and

automatically creating metadata data fields for a new document filed in one of the plurality of folders in the matter file, the metadata fields appropriate for the document type; and

saving user-formulated search queries to said matter file, wherein said saved queries are browse-able and can be re-run at a user's option by selecting a query and wherein saved queries are associate-able with documents and folders.

17. (original) The method of claim 16, further comprising:  
the document inheriting metadata information from the one of the plurality

of folders into which the document is filed.

18. (original) The method of claim 17, wherein the inherited metadata is inferred.

19. (withdrawn) An apparatus comprising:

a server to maintain data; and

a user system to display a Workspace to a user, the workspace including a plurality of matter files, each matter file including a plurality of folders, each folder corresponding to a document type; and

an email interface to generate a matter folder email address, the email interface to receive emails directed to the matter folder email address and file them in a correspondence folder in the matter folder.

20. (withdrawn) The apparatus of claim 19, further comprising: an attribute assignment logic to automatically create metadata data fields for a new document, when the new document is placed in a folder, the metadata fields appropriate for the document type.

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a security component to assign a security level to the document, the security level corresponding to a security level of a parent folder.

4. (previously presented) The DMS of claim 1, further comprising:

a matter creation component to create a new matter folder, the matter creation means comprising:

matter type component to receive a matter type selection from a user, and to create a plurality of folders within the new matter folder, each folder corresponding to a document type.

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a subscription component to enable a user to subscribe to a matter file, the subscription putting a copy of a matter file in the user's My Matters list.

9. (previously presented) The DMS of claim 8, wherein the subscription component enables a user to subscribe to a matter file at a second level, wherein the subscription includes the matter file and documents and other folders.

10. (previously presented) The DMS of claim 8, where the component enables a user to subscribe to another user's subscription list and the user may be granted rights to modify another user's subscription list.

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saving user-formulated search queries to said matter file, wherein said saved queries are browse-able and can be re-run at a user's option by selecting a query and wherein saved queries are associate-able with documents and folders.

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of folders into which the document is filed.

18. (original) The method of claim 17, wherein the inherited metadata is inferred.

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a user system to display a Workspace to a user, the workspace including a plurality of matter files, each matter file including a plurality of folders, each folder corresponding to a document type; and

an email interface to generate a matter folder email address, the email interface to receive emails directed to the matter folder email address and file them in a correspondence folder in the matter folder.

20. (withdrawn) The apparatus of claim 19, further comprising: an attribute assignment logic to automatically create metadata data fields for a new document, when the new document is placed in a folder, the metadata fields appropriate for the document type.